

Long-Term North American Forecast and the Global Context

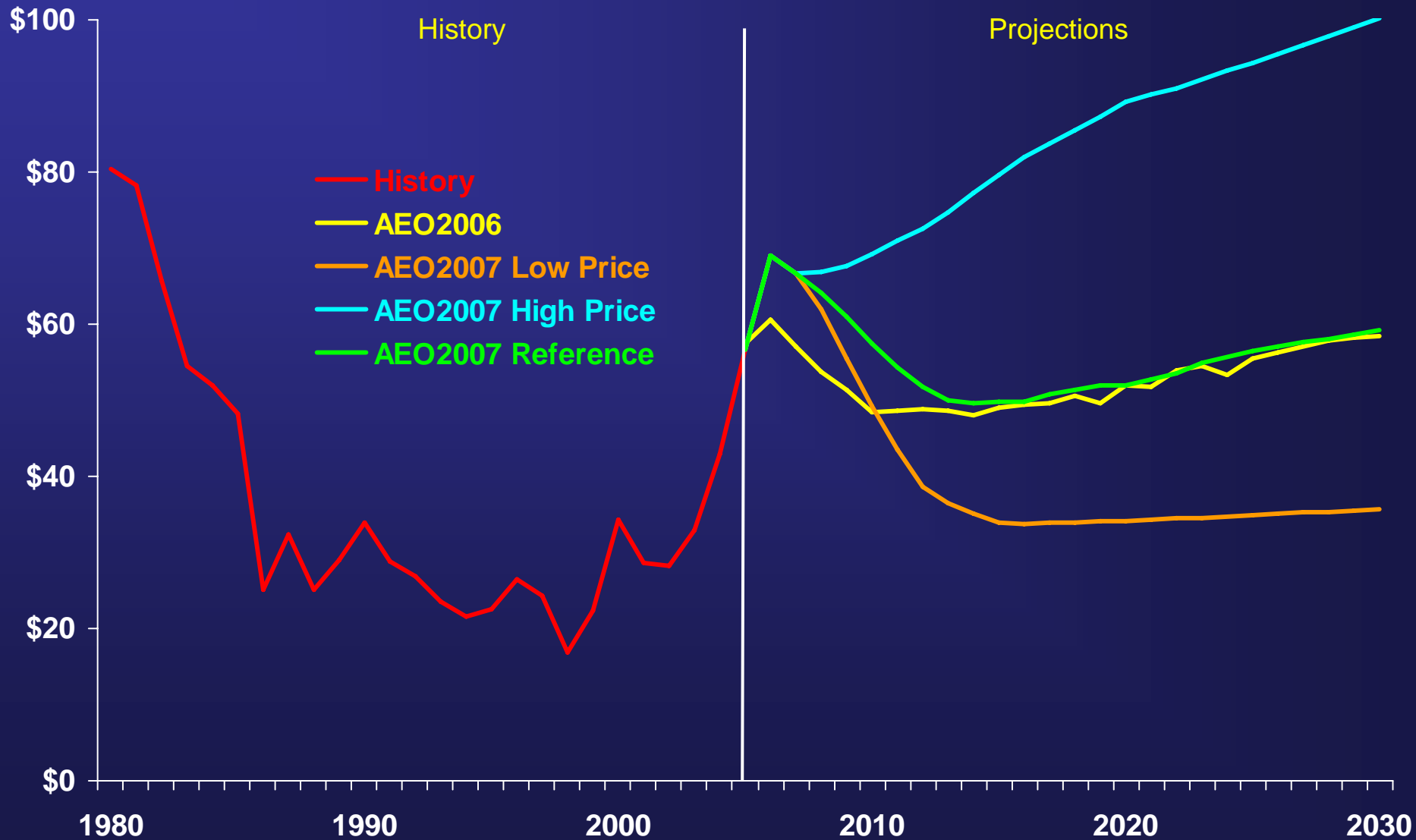
**Guy Caruso, Administrator
Energy Information Administration**

**CERI 2007 Natural Gas Conference
March 5, 2007
Calgary, Alberta**

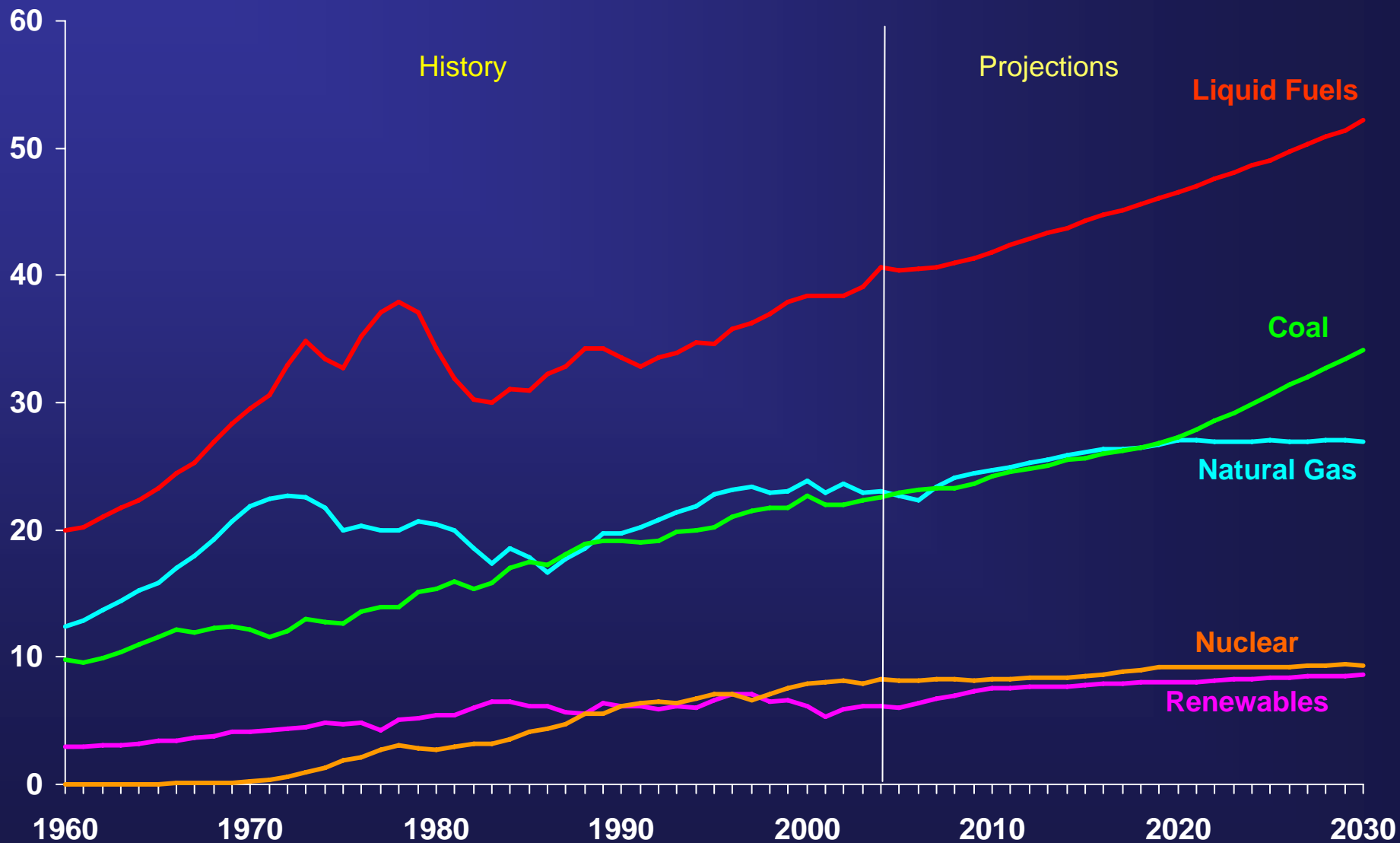
***Annual Energy Outlook 2007* reference case indicates that through 2030....**

- Traditional fossil fuels are expected to continue to meet the bulk of energy requirements over the projection period
- U.S. energy demand is projected to grow at an average annual rate of 1.1 percent
- The energy efficiency of the economy is projected to increase at an average annual rate of 1.8 percent
- U.S. oil import dependence, measured as a share of U.S. oil use, is not expected to increase over the next 25 years
- U.S. natural gas use is projected to be level off over the last decade of the projection
- Future growth in U.S. natural gas supplies depends on unconventional domestic production, natural gas from Alaska, and liquefied natural gas imports
- Carbon dioxide emissions from energy are projected to grow at an average annual rate of 1.2 percent

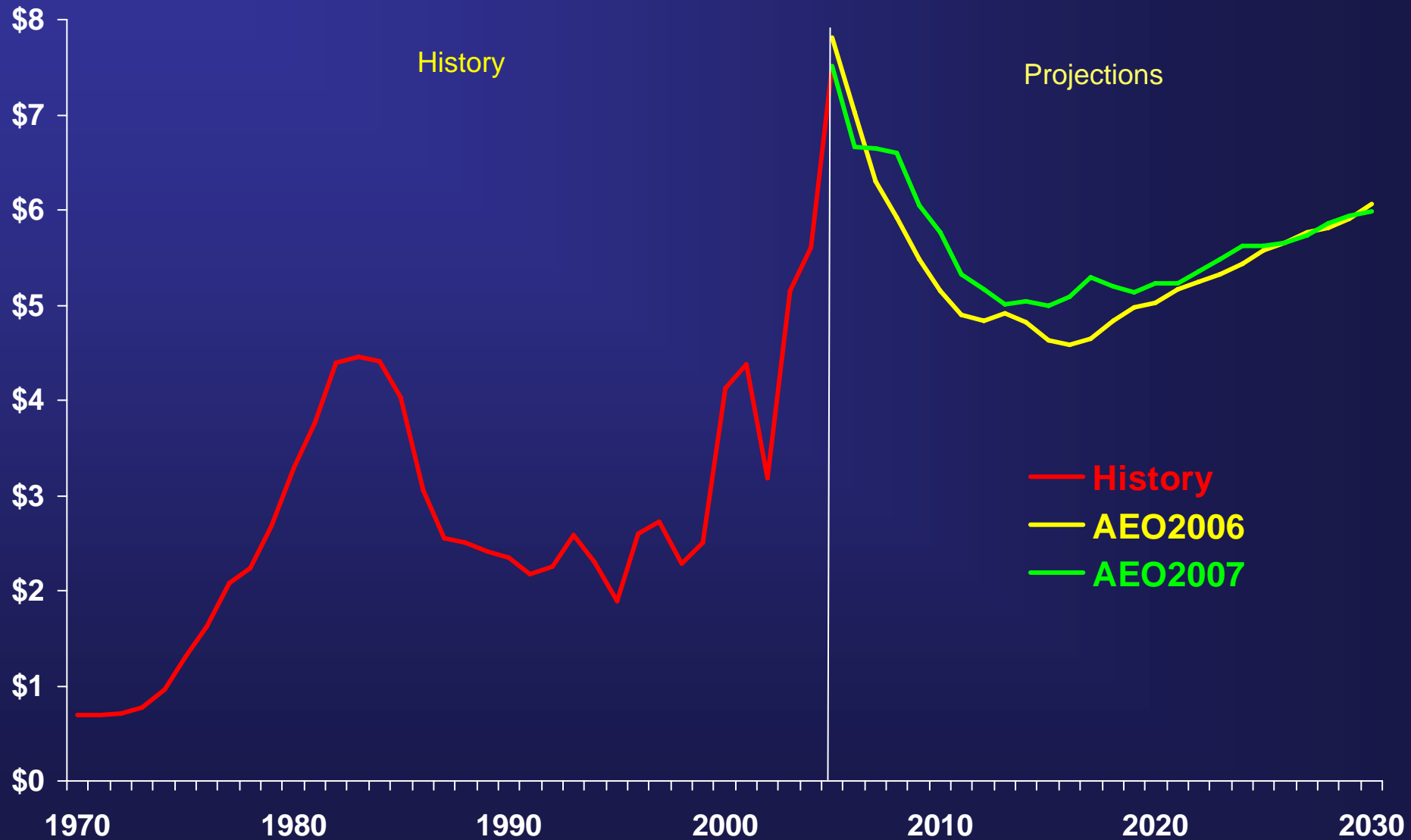
World Oil Price, 1980-2030 (2005 dollars per barrel)



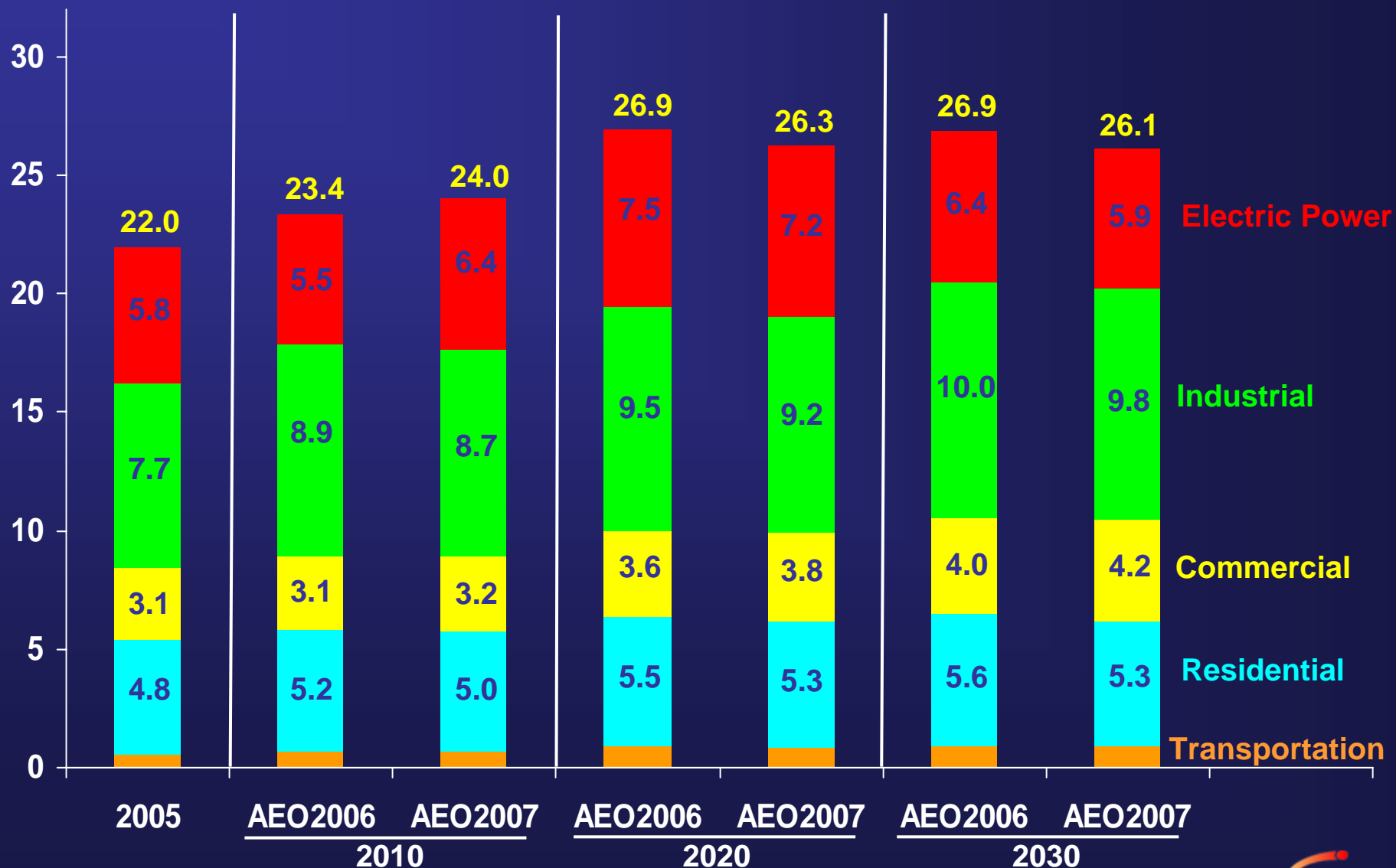
U.S. Primary Energy Consumption by Fuel, 1960-2030 (quadrillion Btu)



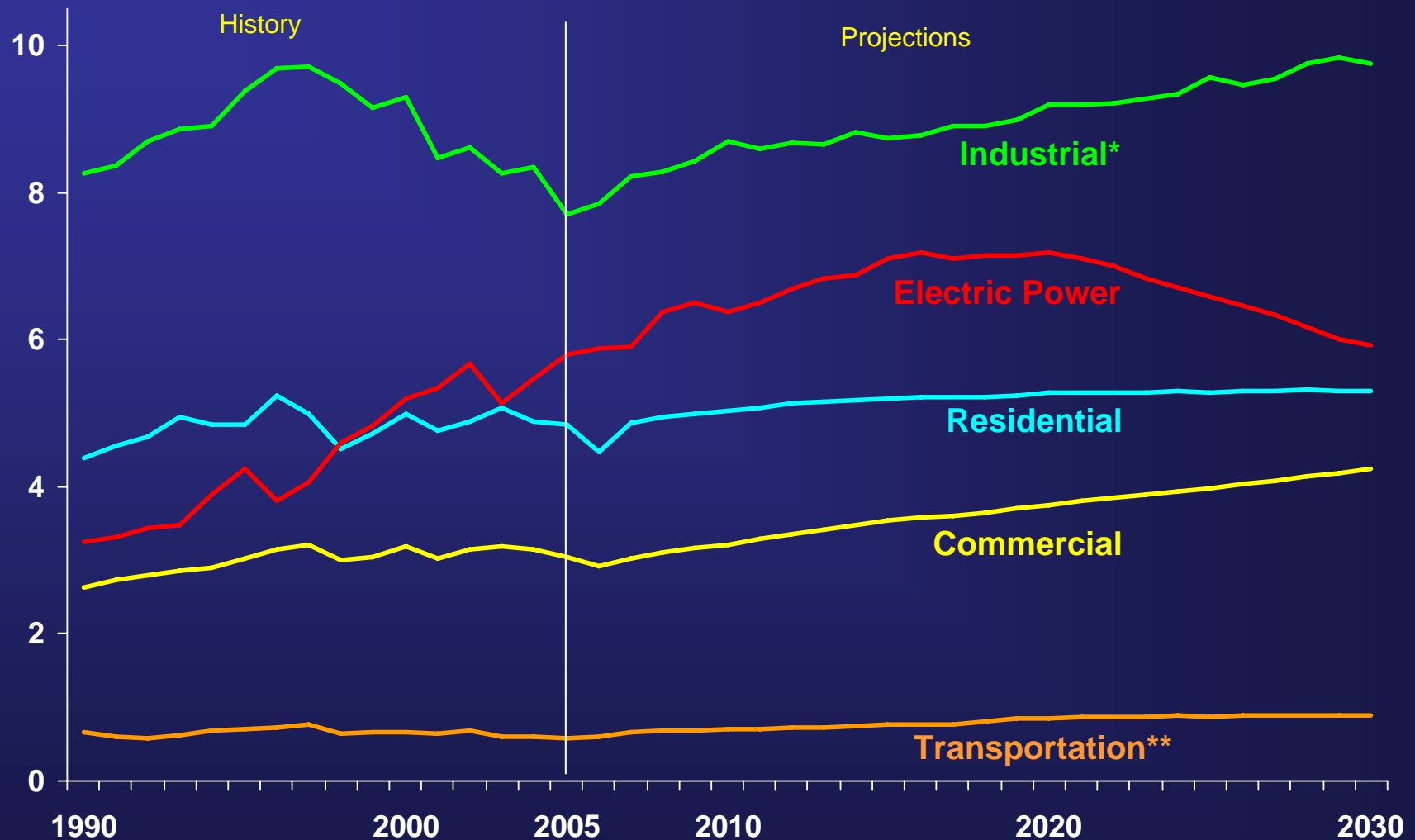
U.S. Natural Gas Wellhead Price, 1970-2030 (2005 dollars per thousand cubic feet)



U.S. Natural Gas Consumption by Sector, 2005, 2010, 2020, and 2030 (trillion cubic feet)



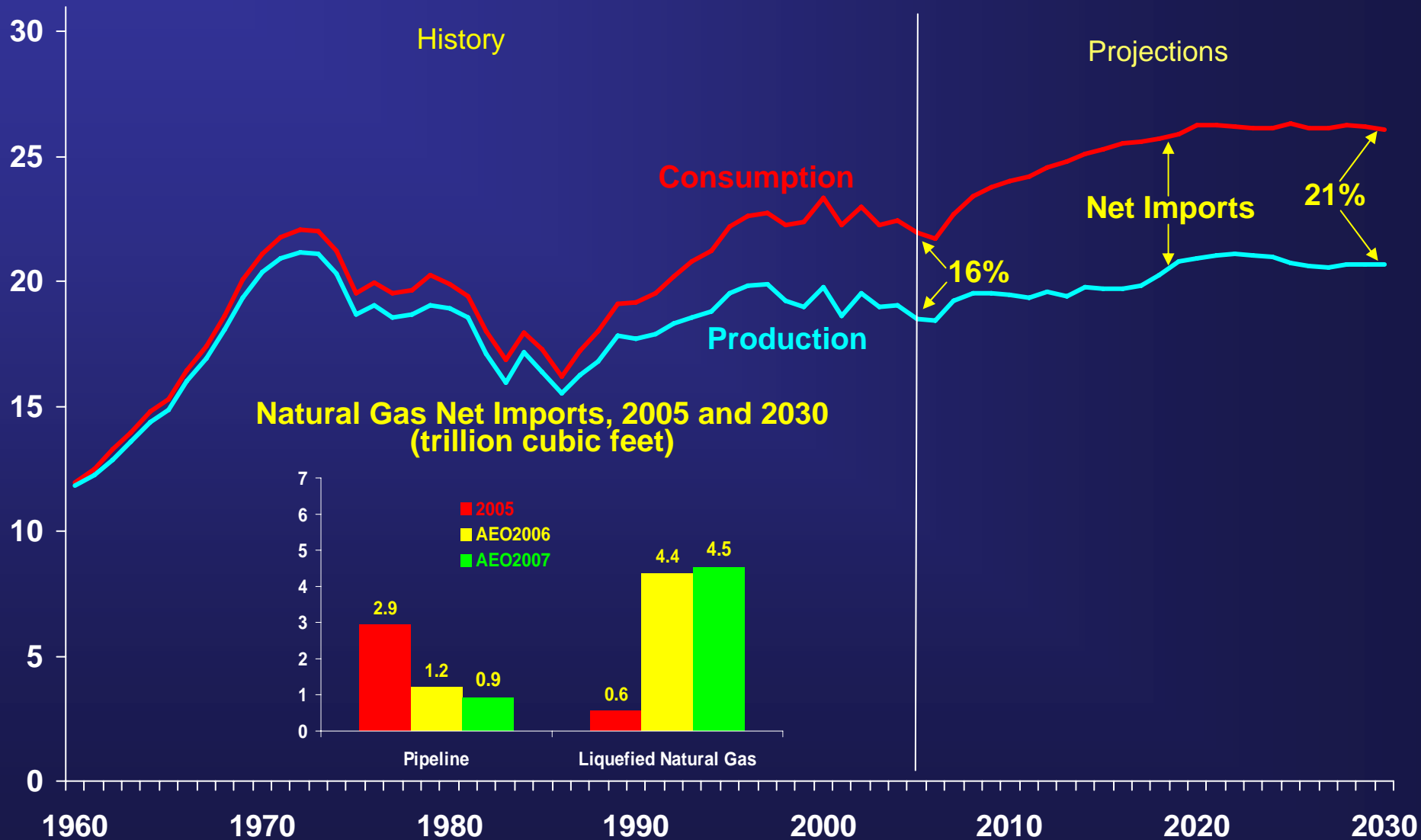
U.S. Natural Gas Consumption by Sector, 1990-2030 (trillion cubic feet)



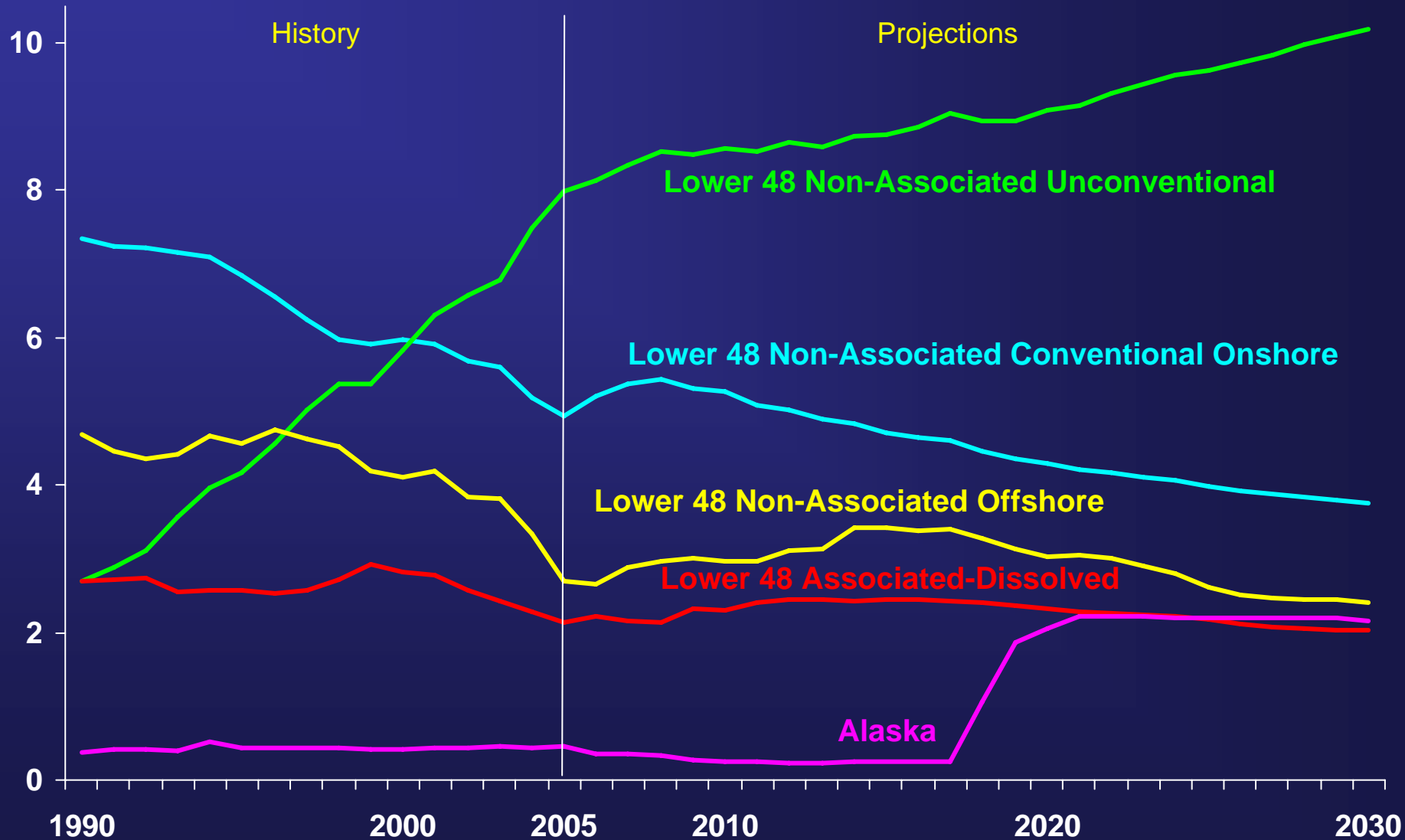
* Includes lease and plant fuel

** Includes pipeline fuel

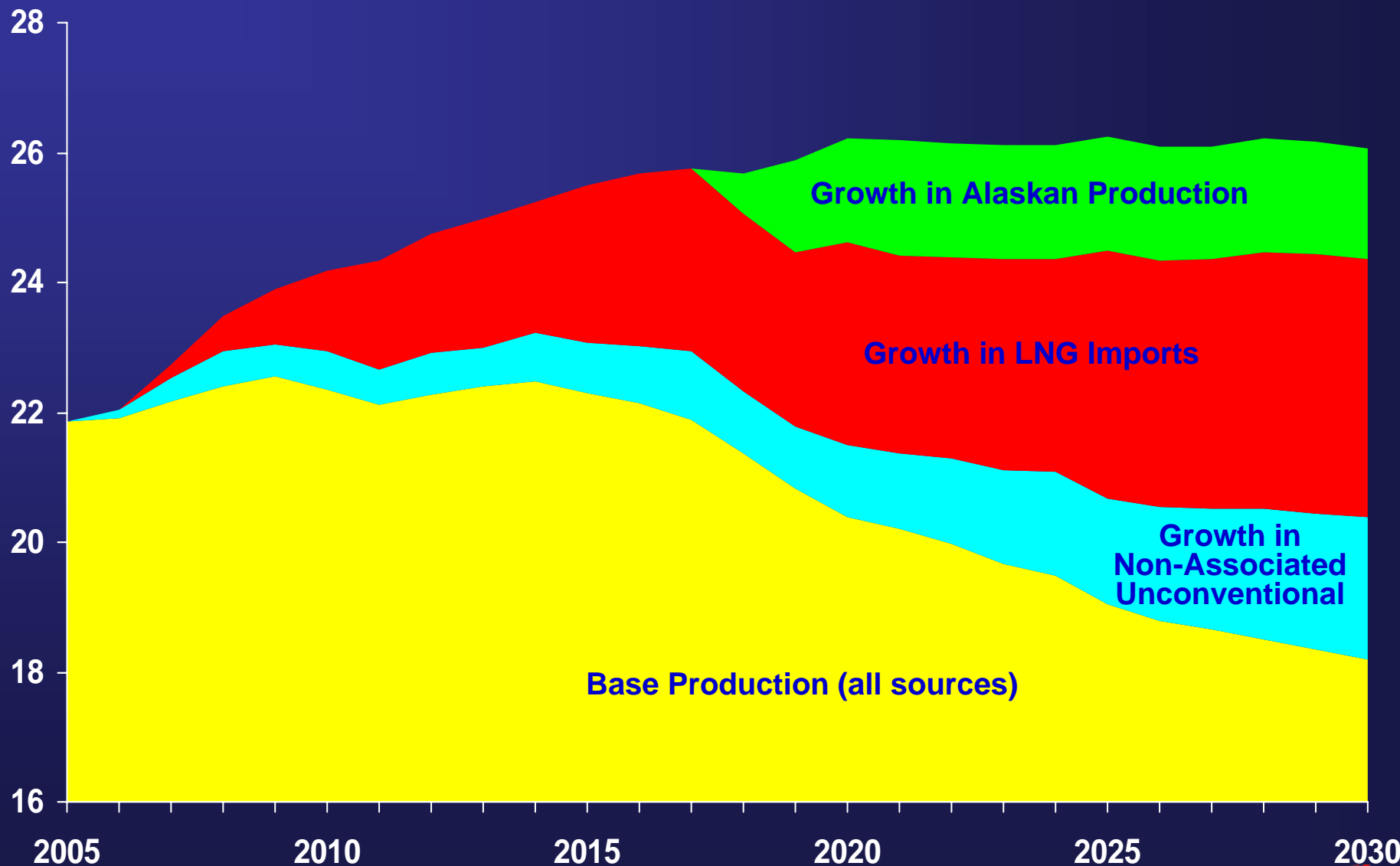
U.S. Natural Gas Production, Consumption, and Net Imports, 1960-2030 (trillion cubic feet)



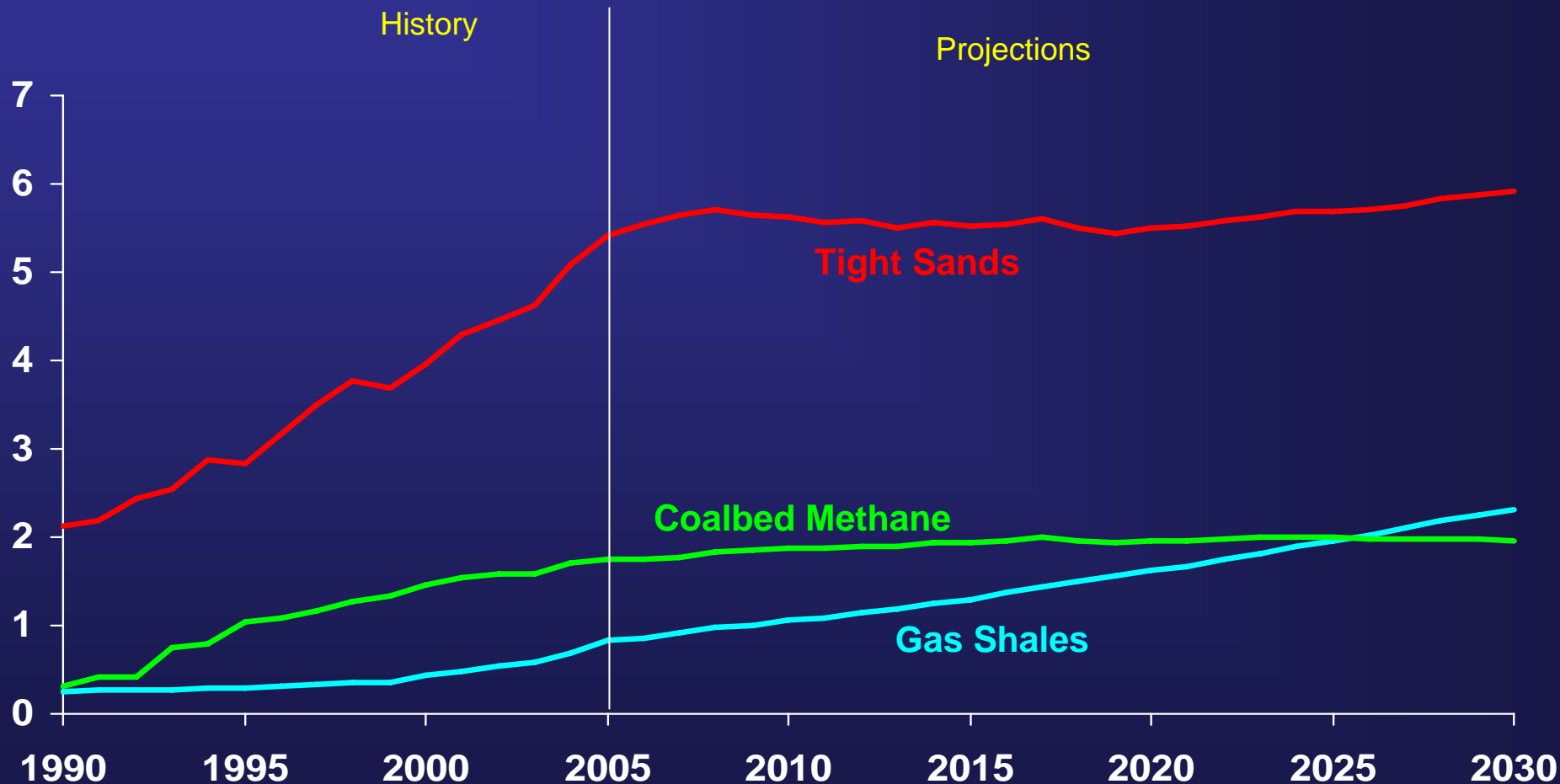
U.S. Natural Gas Production by Source, 1990-2030 (trillion cubic feet)



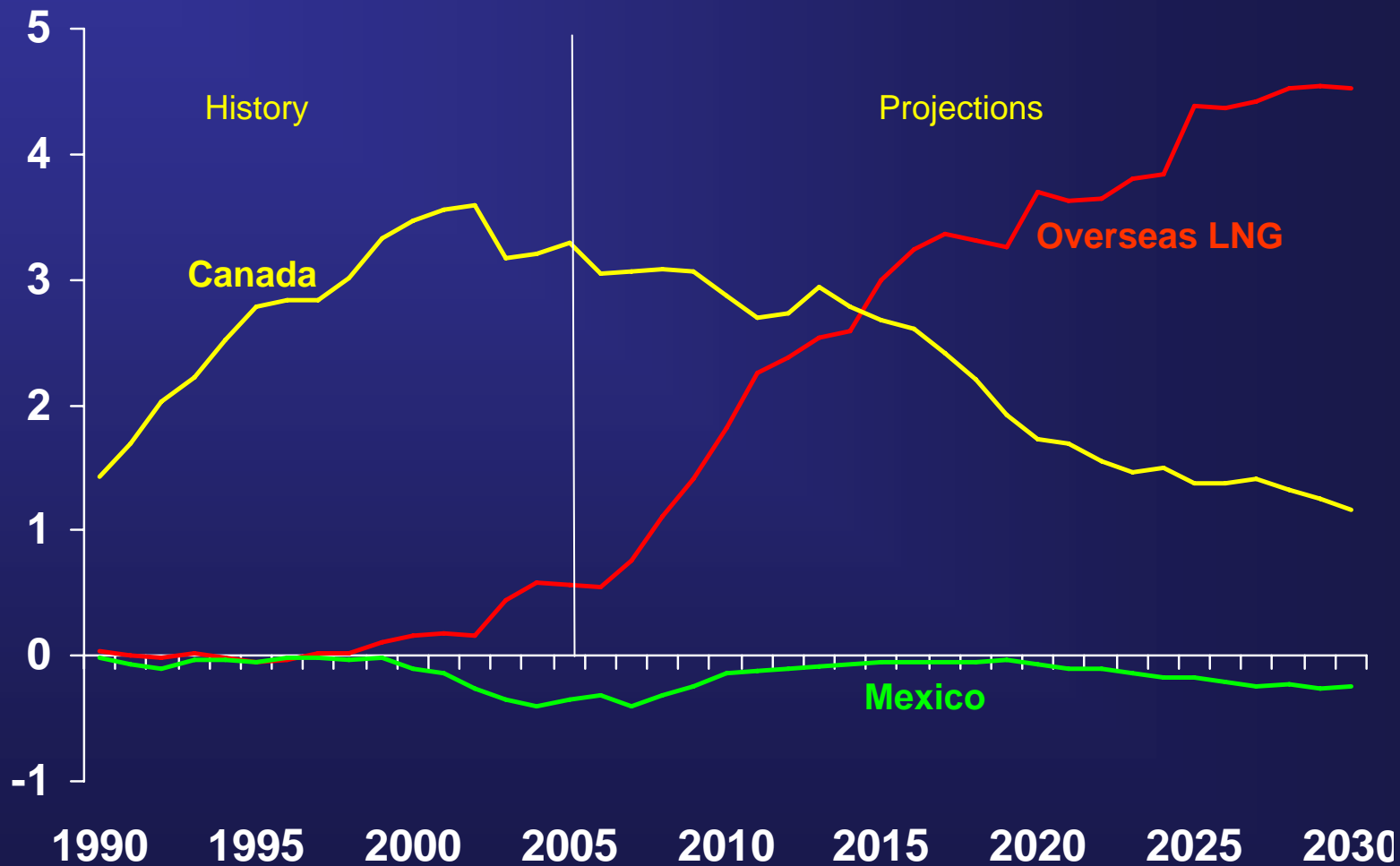
Major Sources of Incremental U.S. Natural Gas Supply, 2005-2030 (trillion cubic feet)



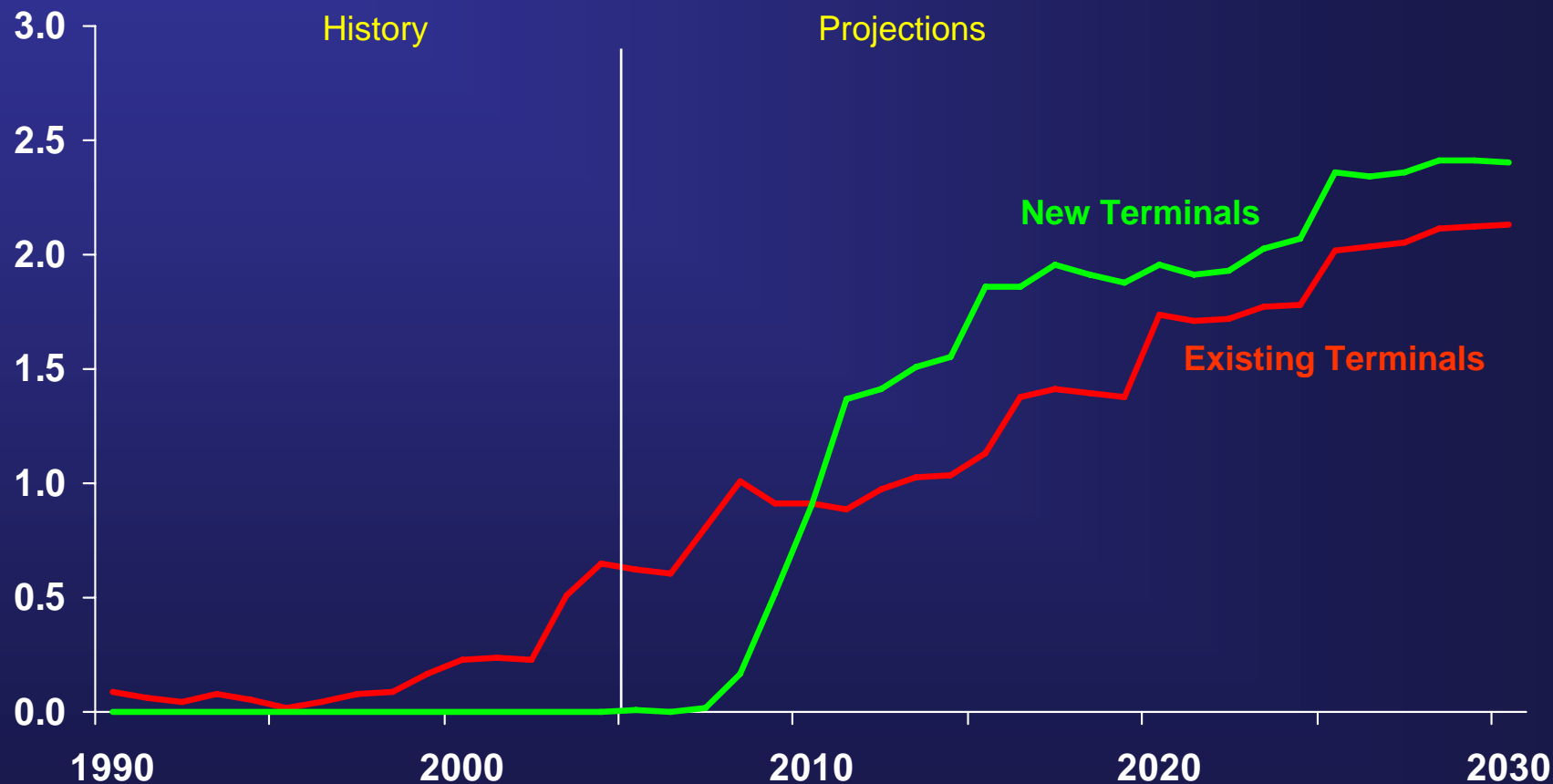
U.S. Unconventional Natural Gas Production, 1990-2030 (trillion cubic feet)



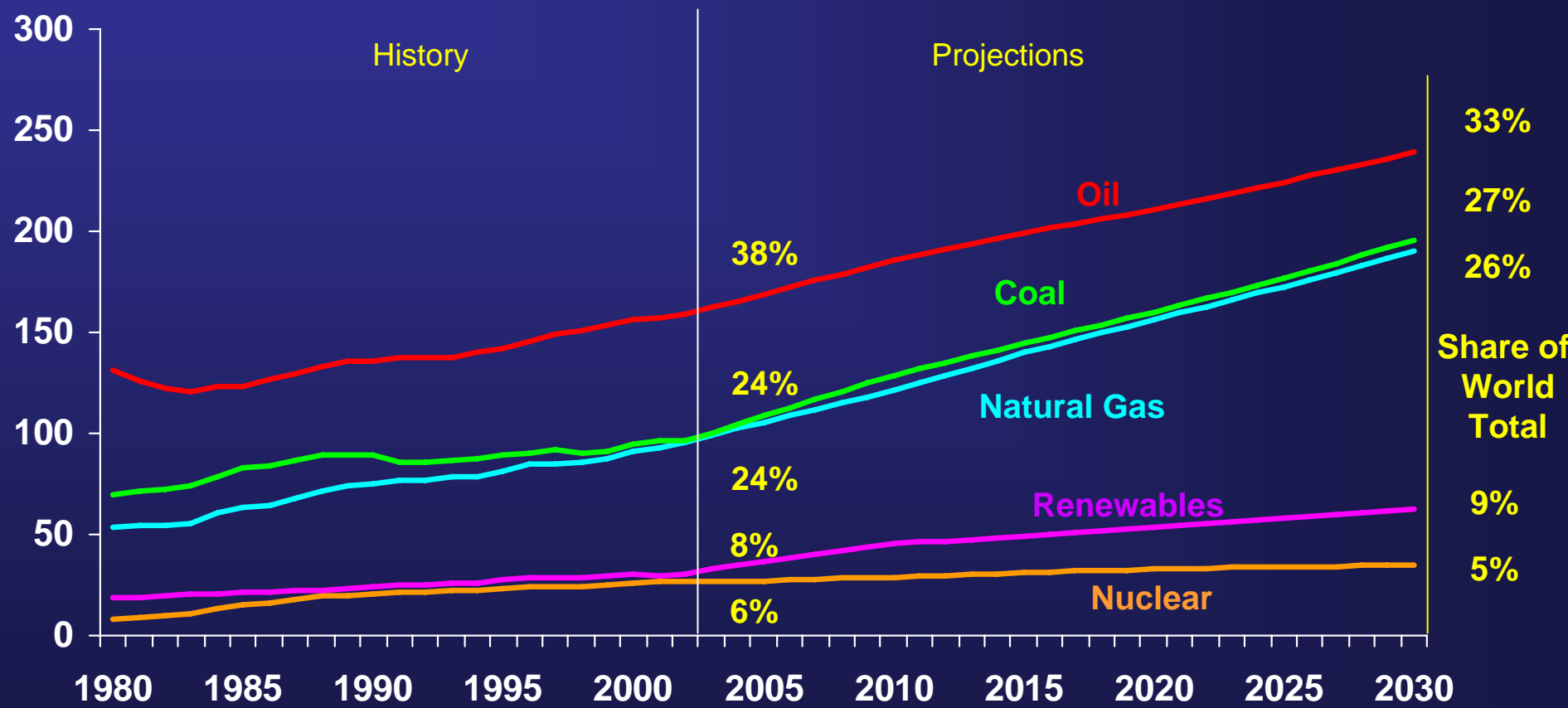
U.S. Net Imports of Natural Gas, 1990-2030 (trillion cubic feet)



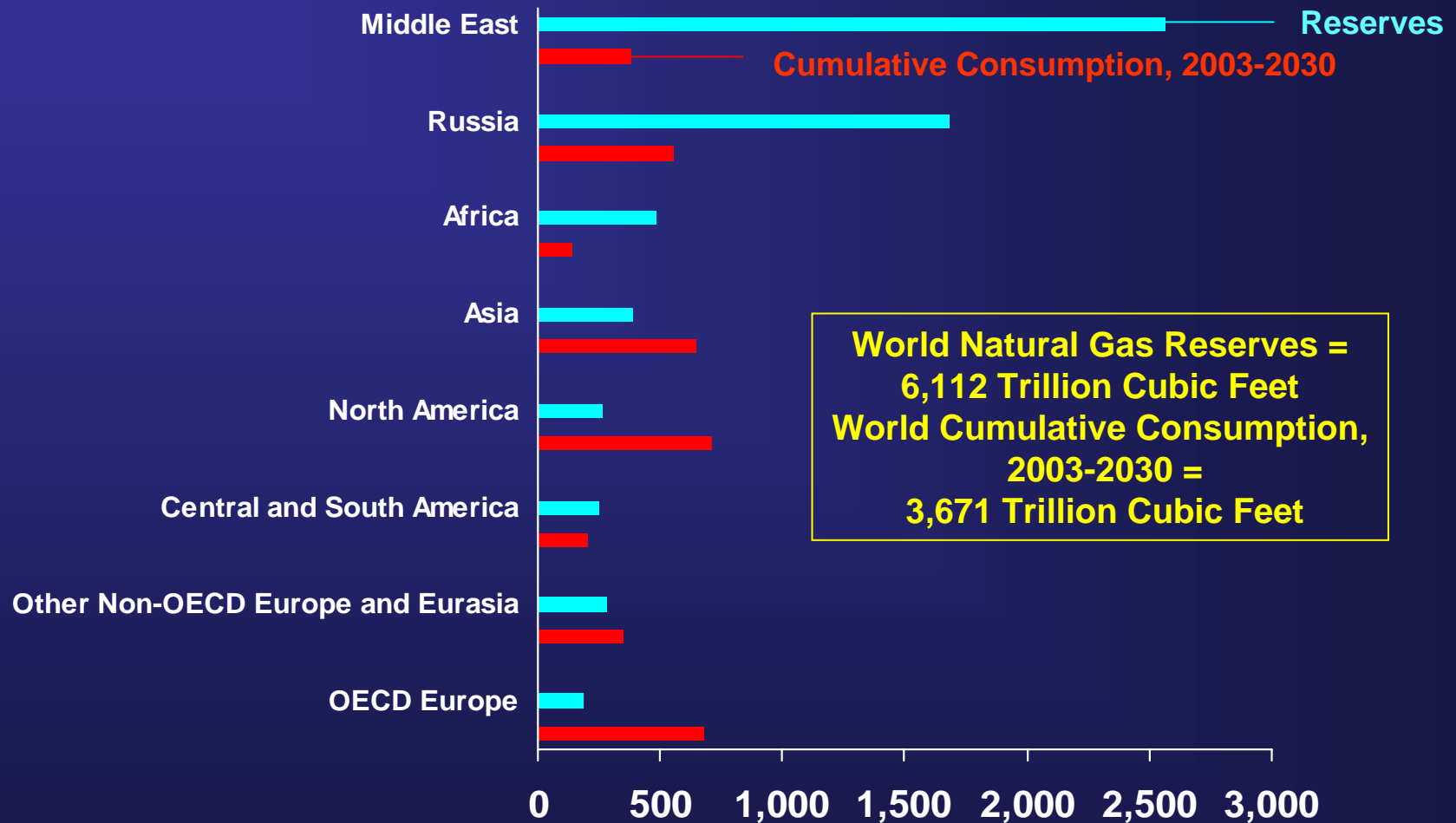
U.S. LNG Imports, 1990-2030 (trillion cubic feet)



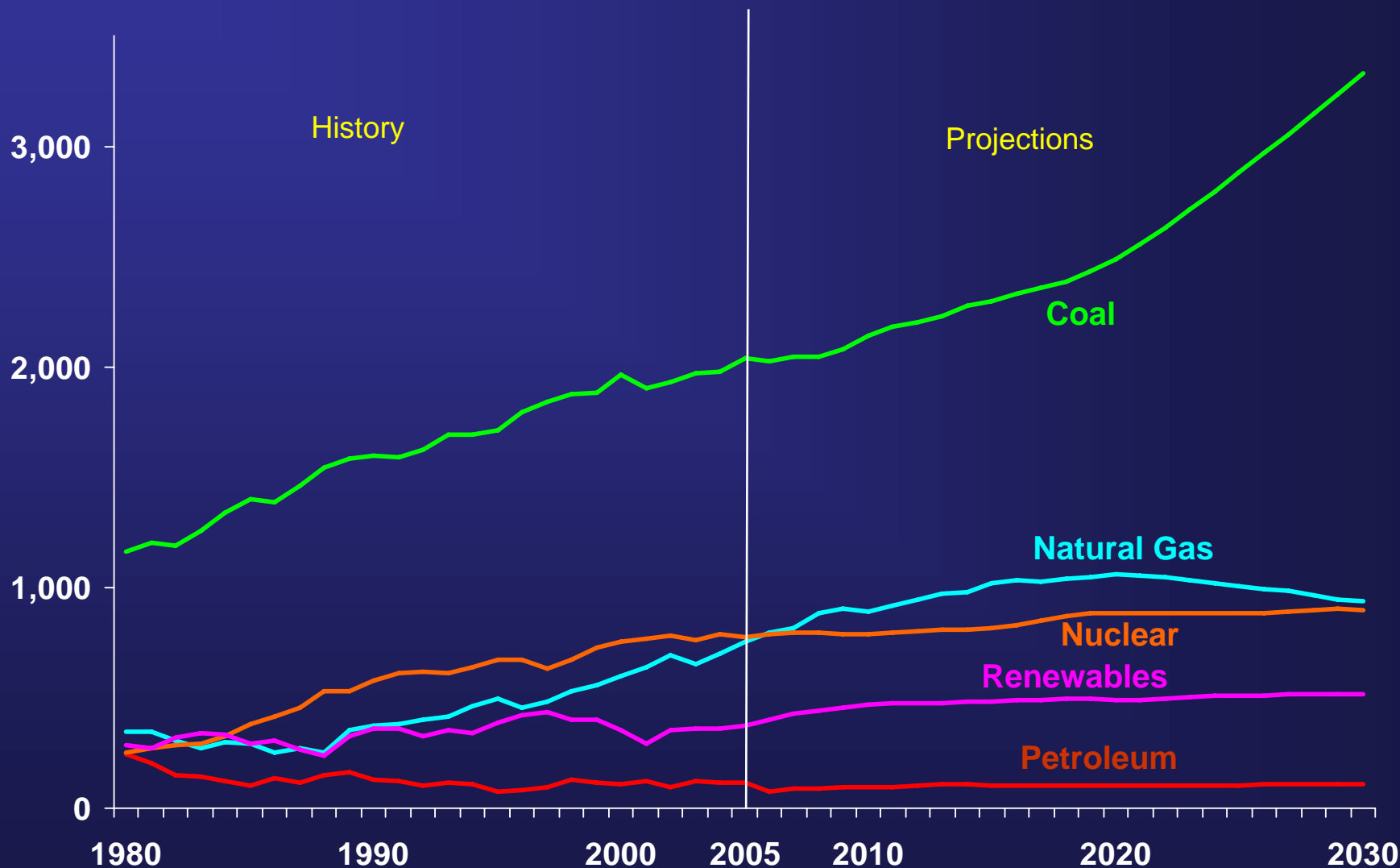
World Marketed Energy Use by Fuel, 1980-2030 (quadrillion Btu)



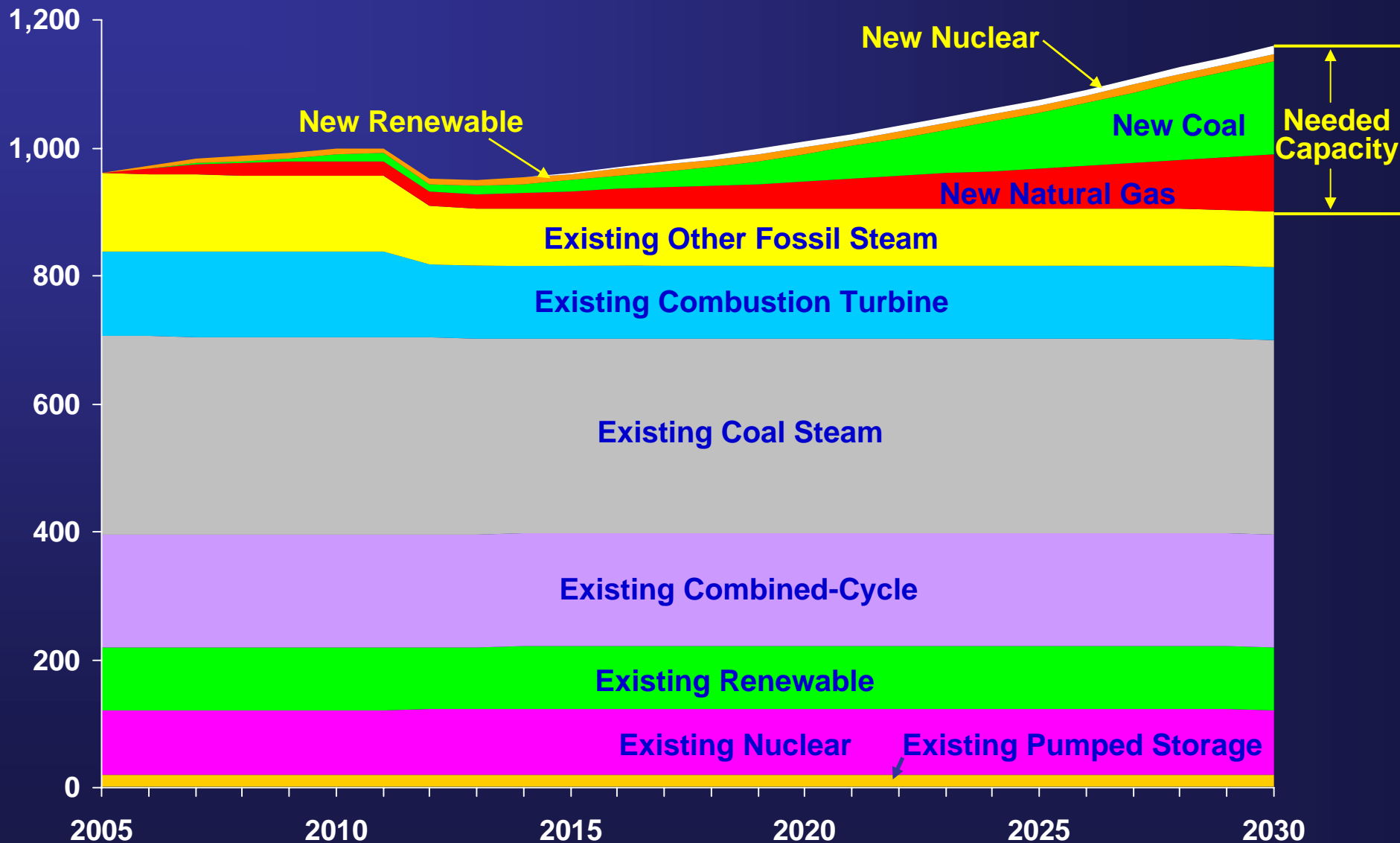
World Natural Gas Reserves, as of January 1, 2006, and Cumulative Consumption, 2003-2030 (trillion cubic feet)



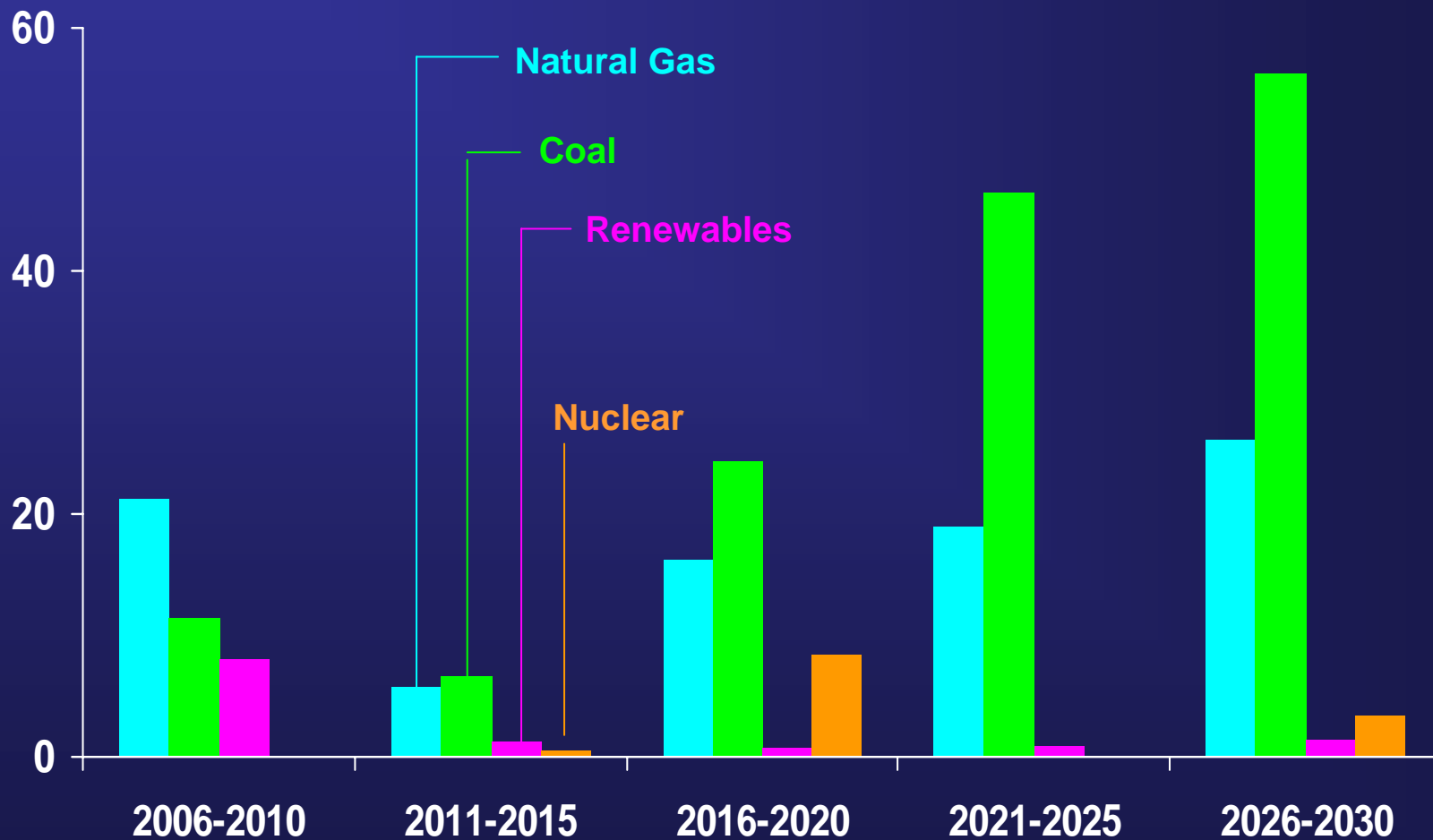
U.S. Electricity Generation by Fuel, 1980-2030 (billion kilowatthours)



U.S. Electricity Generating Capacity, including Combined Heat and Power, 2005-2030 (gigawatts)



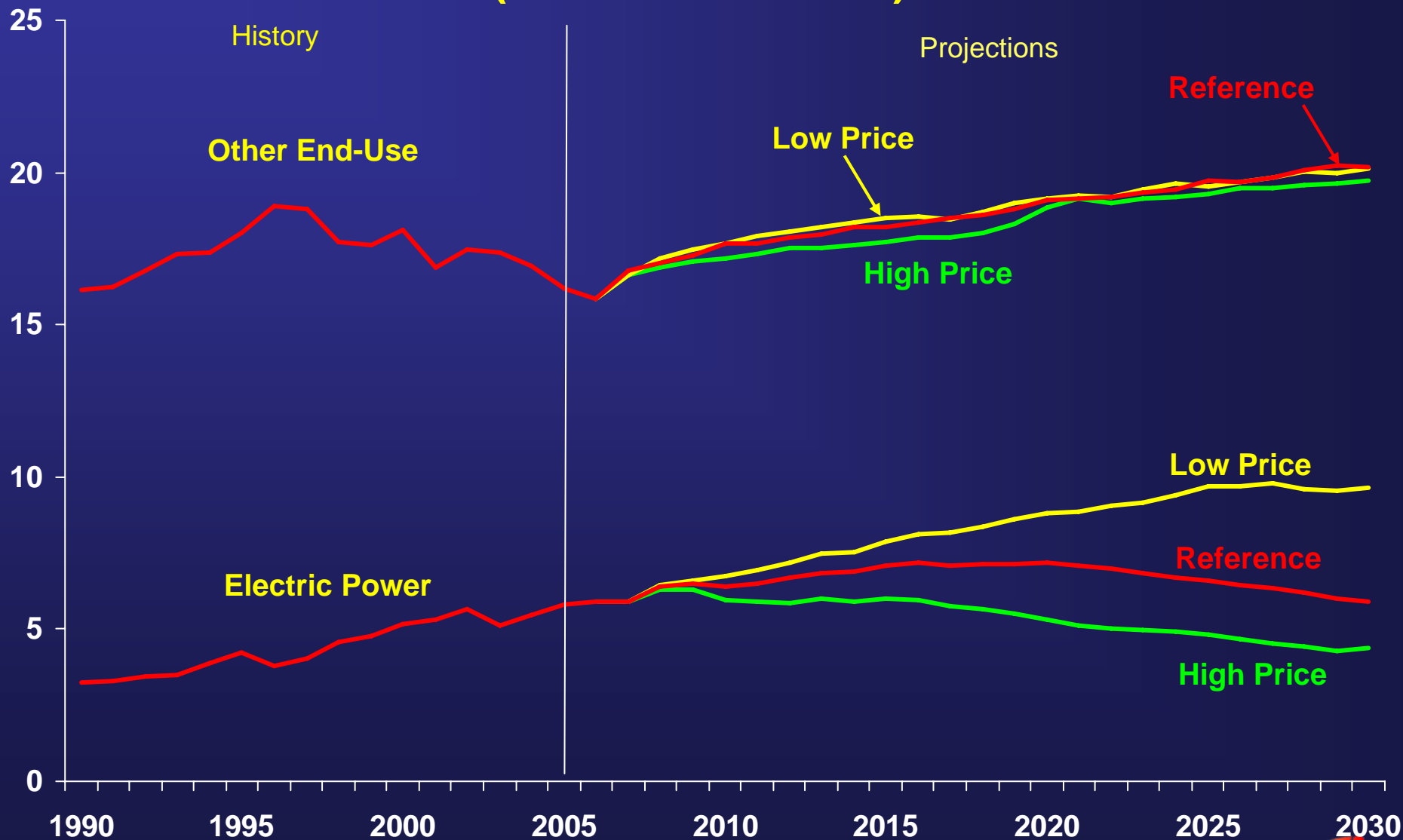
U.S. Electricity Generation Capacity Additions by Fuel, 2006-2030 (gigawatts)



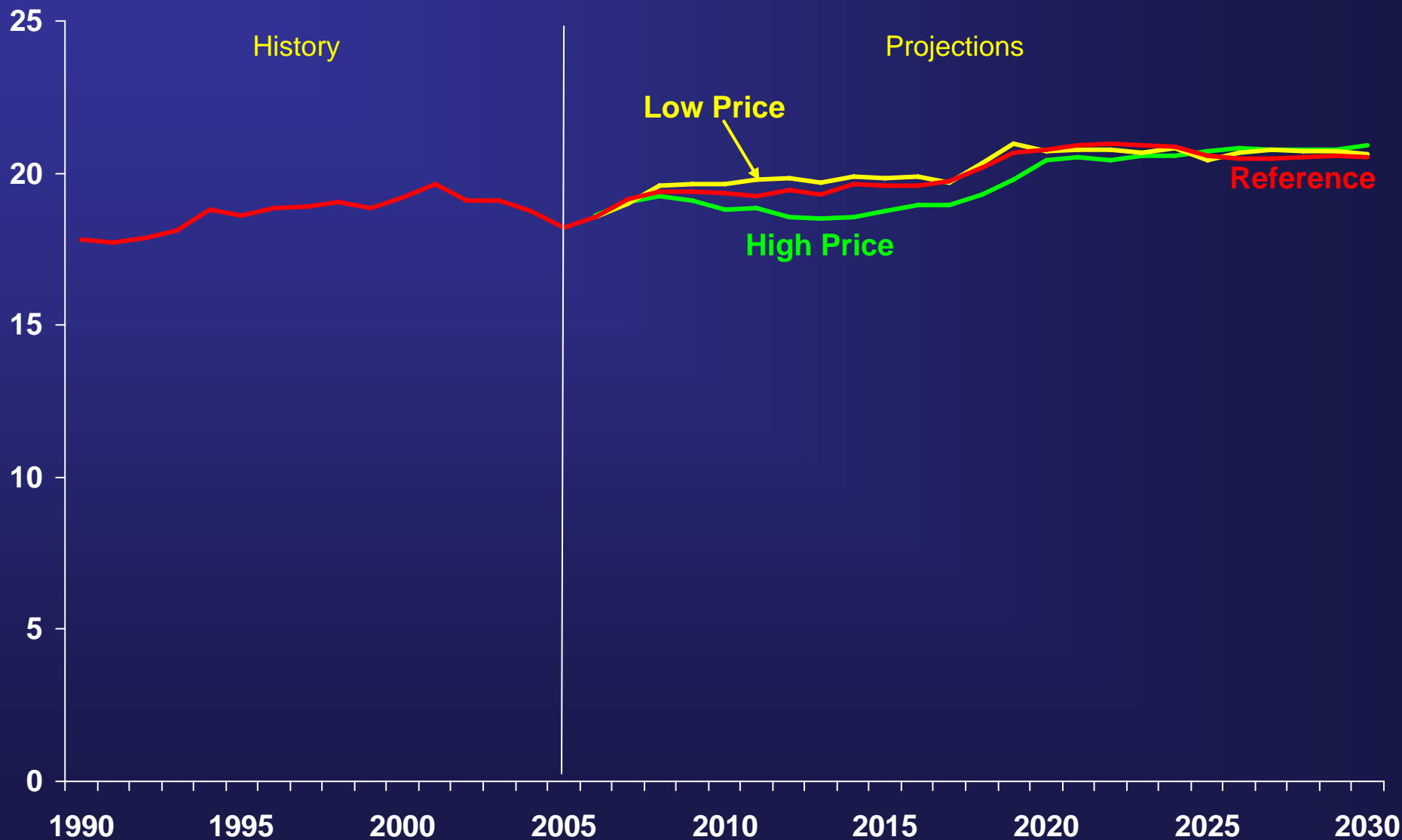
Lower 48 Wellhead Natural Gas Prices in Alternative Cases, 1990-2030 (2005 dollars per thousand cubic feet)



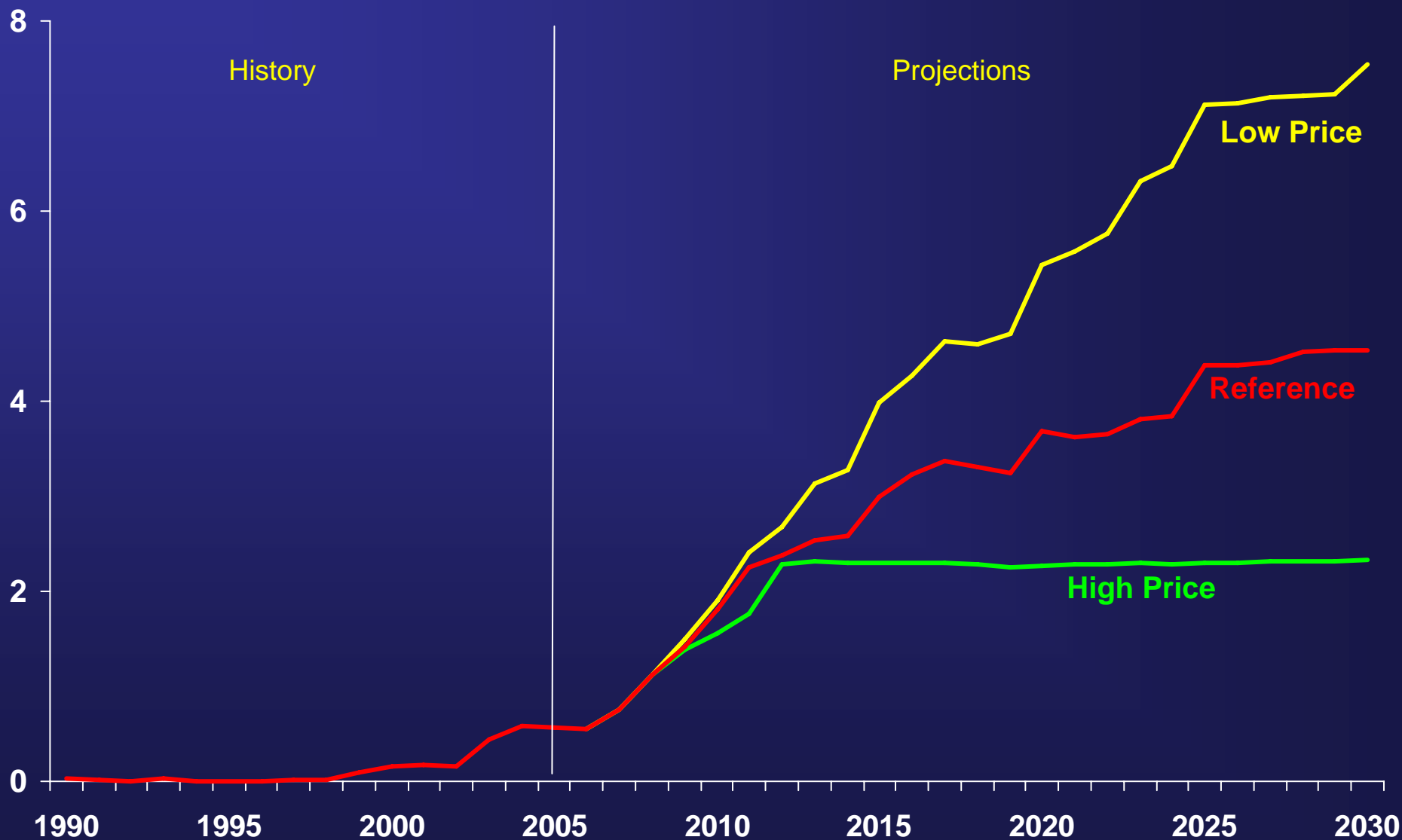
Natural Gas Consumption in the Electric Power and Other End-Use Sectors in Alternative Price Cases, 1990-2030 (trillion cubic feet)



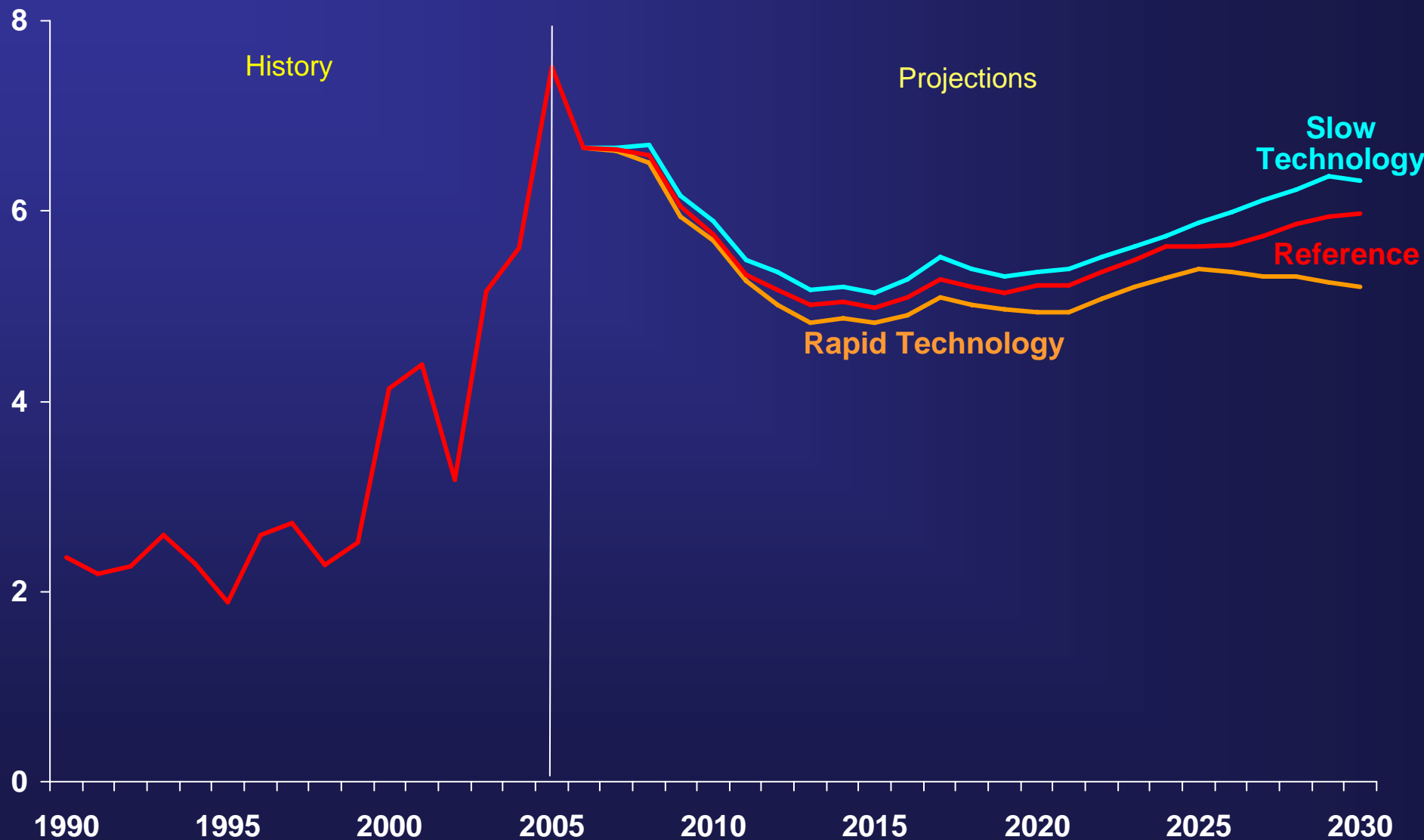
Total U.S. Natural Gas Production in Alternative Cases, 1990-2030 (trillion cubic feet)



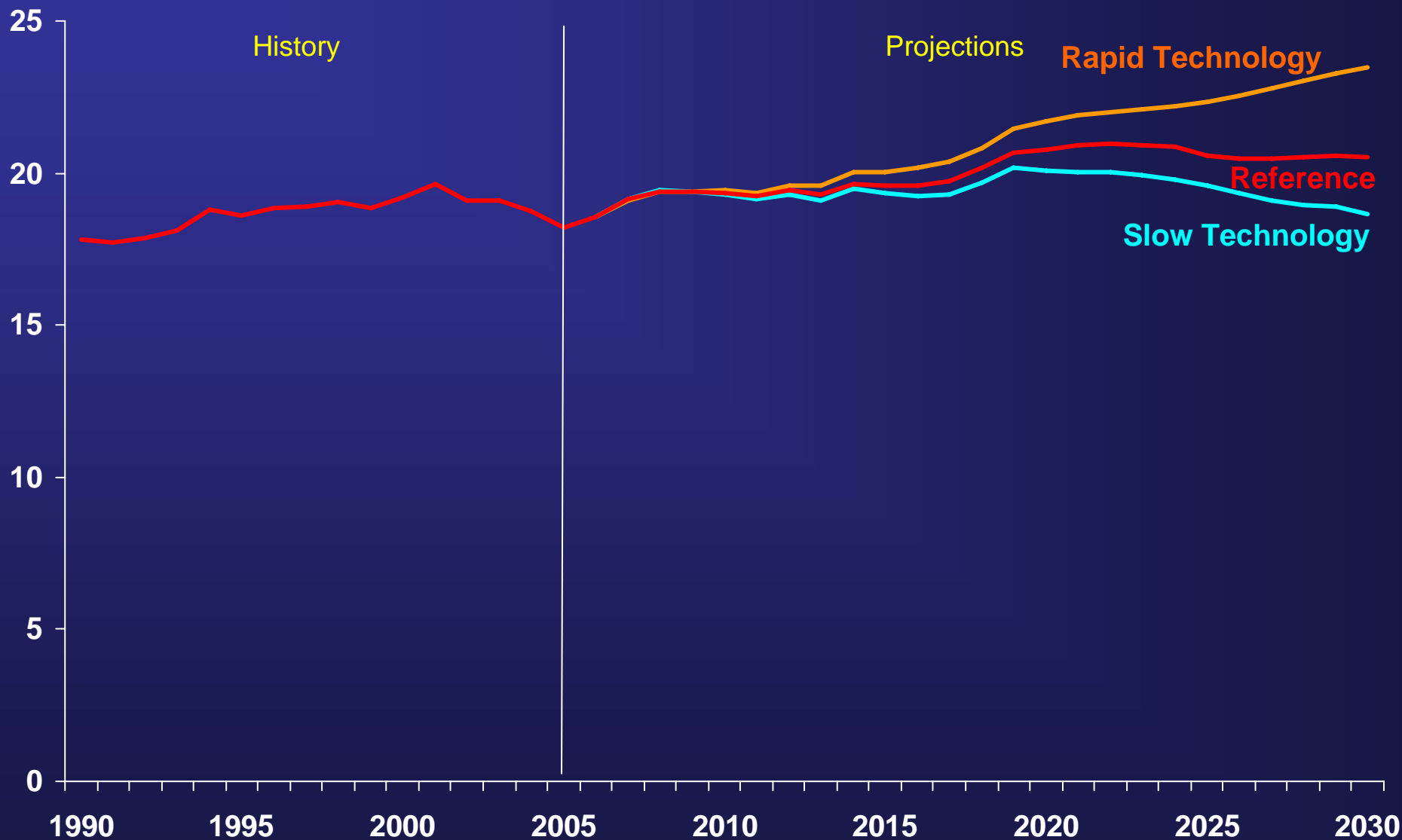
Net U.S. Imports of Liquefied Natural Gas in Alternative Cases, 1990-2030 (trillion cubic feet)



Lower 48 Wellhead Natural Gas Prices in Alternative Cases, 1990-2030 (2005 dollars per thousand cubic feet)



Total U.S. Natural Gas Production in Alternative Cases, 1990-2030 (trillion cubic feet)



Periodic Reports

Petroleum Status and Natural Gas Storage Reports, weekly

Short-Term Energy Outlook, monthly

*Annual Energy Outlook 2007, reference case December 2006, full report
February 2007*

International Energy Outlook 2006, June 2006

Examples of Special Analyses

“Economic Effects of High Oil Prices,” Annual Energy Outlook 2006

*Analysis of Oil and Gas Production in the Arctic National Wildlife Refuge,
March 2004*

The Global Liquefied Natural Gas Market: Status and Outlook, December 2003

“Restricted Natural Gas Supply Case,” Annual Energy Outlook 2005

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